



ADMINISTRATIVE LEAD

Overview

Heritage on the Marina is a continuing care Retirement Community located in the beautiful Marina district of San Francisco. We are home to approximately 120 senior residents and a Five-Star-Rated Medicare Community. We embrace the mindset, “Caring, which demonstrates we value one another.” We set ourselves apart by our conscious commitment to serve as a model of excellence for senior care.

Under minimal supervision and reporting to the Human Resources Director, the Administrative Lead is the primary clerical support to the Executive Team and other departments. This highly visible team member treats all residents, guests, employees and colleagues with professionalism, patience, respect and courtesy. The Administrative Lead must maintain a policy of strict confidentiality on behalf of Heritage on the Marina.

Essential Job Duties

- Prepare and distribute communication, such as memos, letters, email correspondence, flyers, invoices, reports and other documents to residents, team members, vendors, clients or future residents.
- Transcribe dictation or compose correspondence as directed. Proofread documents before preparing a final version or provide drafts to supervisors for review and approval before putting it in final form. Distribute correspondence to proper addressees. Attach proper documentation to support the correspondence, such as board minutes that may need to be attached to a cover letter.
- Coordinate the CMMS (Worxhub) work order process. Manually enter work orders, assist with prioritizing and assigning orders to maintenance staff. Assist in preparing reports on timeliness of work order completion.
- Assist in processing Maintenance department invoices. Assist in submitting invoices for review, and provide reports to the Director, Plant Operations.
- Board Meetings:
 - Manage all aspects of Board of Directors’ (BOD) and committee meetings, including formatting agenda and arranging meeting logistics.
 - Edit BOD minutes for the Board Chair and CEO’s approval. Post final copy of Board minutes to BOD Portal prior to the following month’s board meeting.
 - Manage internal communications and prepare or keep track of BOD meeting dates, meeting agendas and minutes from the meeting. Keep detailed record of the BOD’s actions and post approved minutes in the library archive.
 - Direct and educate new BOD members on Portal for orientation documentation, meeting packets, etc.
 - Create and update BOD rosters and annual meeting schedule.
- Create, audit and maintain document tracking database (e.g. Excel or other software) for compliance, such as required training or other departmental required compliance.
- Maintains the scheduling calendar of public spaces, including resident activities and Directors meetings; communicates meeting room needs to Directors.
- Supports Marketing and Admissions team with events, including planning,

communication and electronic promotions. Manage, coordinate and communicate other events, including annual resident and holiday celebration, monthly birthday and anniversary celebrations, Town Hall, and other Heritage on the Marina events.

- Provides relief for the Front Office team.
- Perform other miscellaneous administrative and clerical duties and provides clerical and administrative support to Directors.
- Provides administrative support for resident committees.
- All other tasks assigned by the Chief Executive Officer, Controller, Human Resources Director, Marketing and Admissions Director, and NHA/Operations Director/Compliance Officer.
- Maintains strict resident/employee confidentiality.

Education and other Qualifications

- High School diploma or equivalent.
- Must complete and pass a physical examination with tuberculosis (TB) screen prior to employment.
- Employment contingent upon fingerprint clearance from the Department of Justice.

Knowledge, Skills and Abilities

- Understanding of and compliance with HIPPA guidelines.
- Advanced proficiency in computer skills, including Microsoft Office Suite.
- Must complete physical examination and pass a TB test prior to employment.